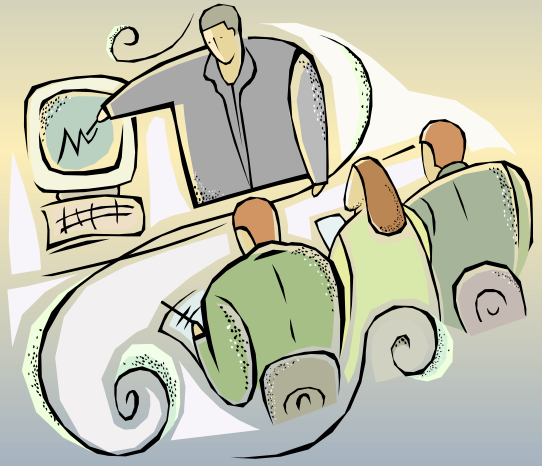
Electronic Document Access (EDA)

Contract Inactivation & Replacement



“Fly-in” Action

(Continue to Page Down/Click on each page…)

Inactivate and Replace Documents

- Ability to *Inactivate* and *Replace* Base Contract Documents
- Ability to *Inactivate* and *Replace* Mods/DO/TO Documents
- Maintenance capability is isolated to individuals by Role & Issue DoDAAC(s). EDA POC grants Special Role (Upload/Inactivate Document role) to user.
- Conversion of Microsoft word documents (.doc) and Adobe post script files (.ps) to PDF

Contract Maintenance Business Rules & Mechanics…

Contract Maint Business Rules

- Only Authorized Users with the Upload /Inactivate role w/valid “Issue” DoDAAC(s) can inactivate or replace contract documents
- All replaced documents are scanned for virus *(if infected, the document will not be accepted. EDA does not fix a virus)*
- Accepts PDF file formats & converts Microsoft word documents (.doc) and Adobe postscript files (.ps) to PDF *(all other file types are invalid for conversion)*
- The conversion process does not retain/store the original form/file type of the document
- Conversion of files occurs “near real-time” *(May need to wait)*
- Converted PDF is placed on the EDA document server
- Accepts any size file. EDA has no file size limitation

Maint Business Rules - Cont

- Special Upload/Inactivate role is granted via organizations EDA POC
- EDA POCs must have Upload/Inactivate role to delegate role to lower levels of an organization
- Document inactivation activity triggers e-mail notifications to:
  - DFAS *(based on Pay DoDAAC)*
  - All Contract Load Notification List members, *if lists exists* prior to “Inactivation event”
- Document Replacement activity triggers the Daily EDA Load Reports
  - All Contract Load Notification List members, *if lists exists* prior to “Repl
    by e-mail

To Obtain the Upload/Inactivate Role…

To Obtain Upload/Inactivate

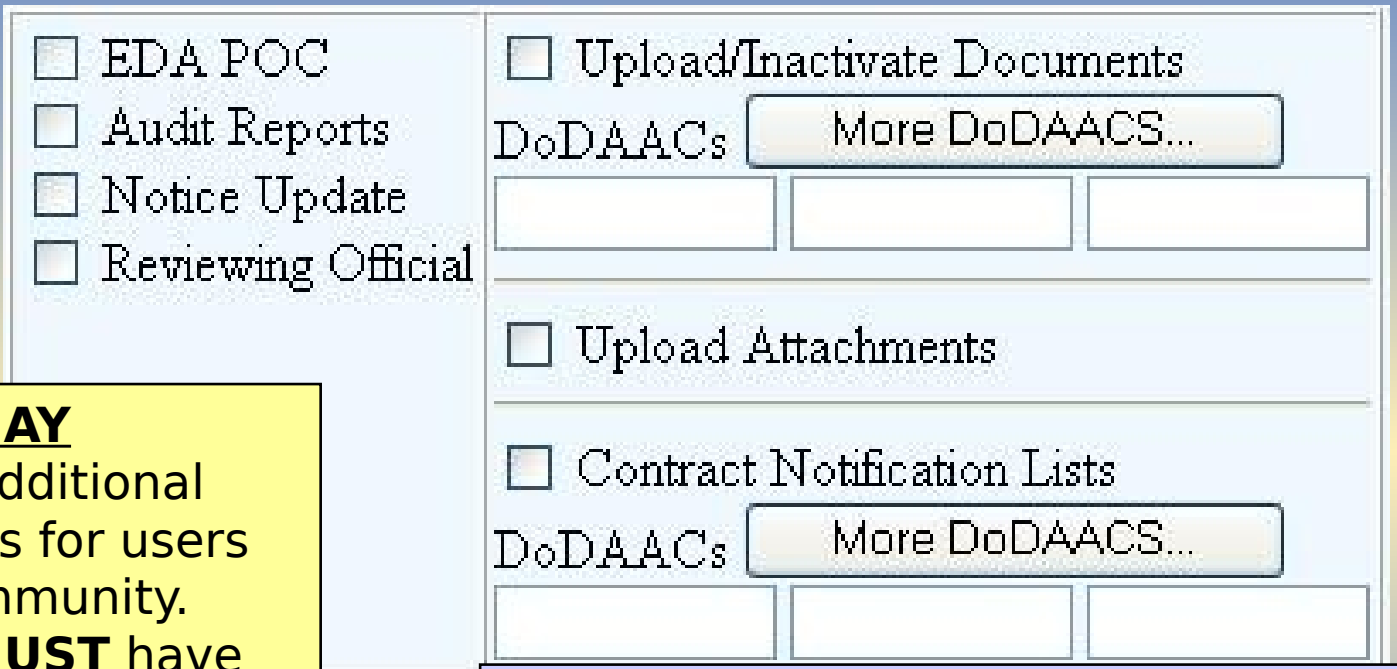
Request Contract Upload/Inactivate/Replace Role by contacting your EDA POC. Supply "Issue" DoDAAC(s)
(EDA POC will verify need of special role)

Note: To delegate/apply the Upload/Inactivate role to users in lower organizational levels within the C/S/A, the authority level accounts *(EDA POC/Executives)* require the Upload/Inactivate role on their own user accounts. Must have role to 'delegate' role.

EDA POC validates request and logs into EDA and performs maintenance on an account. *('checks' Upload/Inactivate Role, enters Issue DoDAAC(s) and processes/confirms updates).*

EDA POC Grants Special Role to User…

EDA POC 'toggles' on Role



EDA POCs **MAY** authorize additional special roles for users in their community.

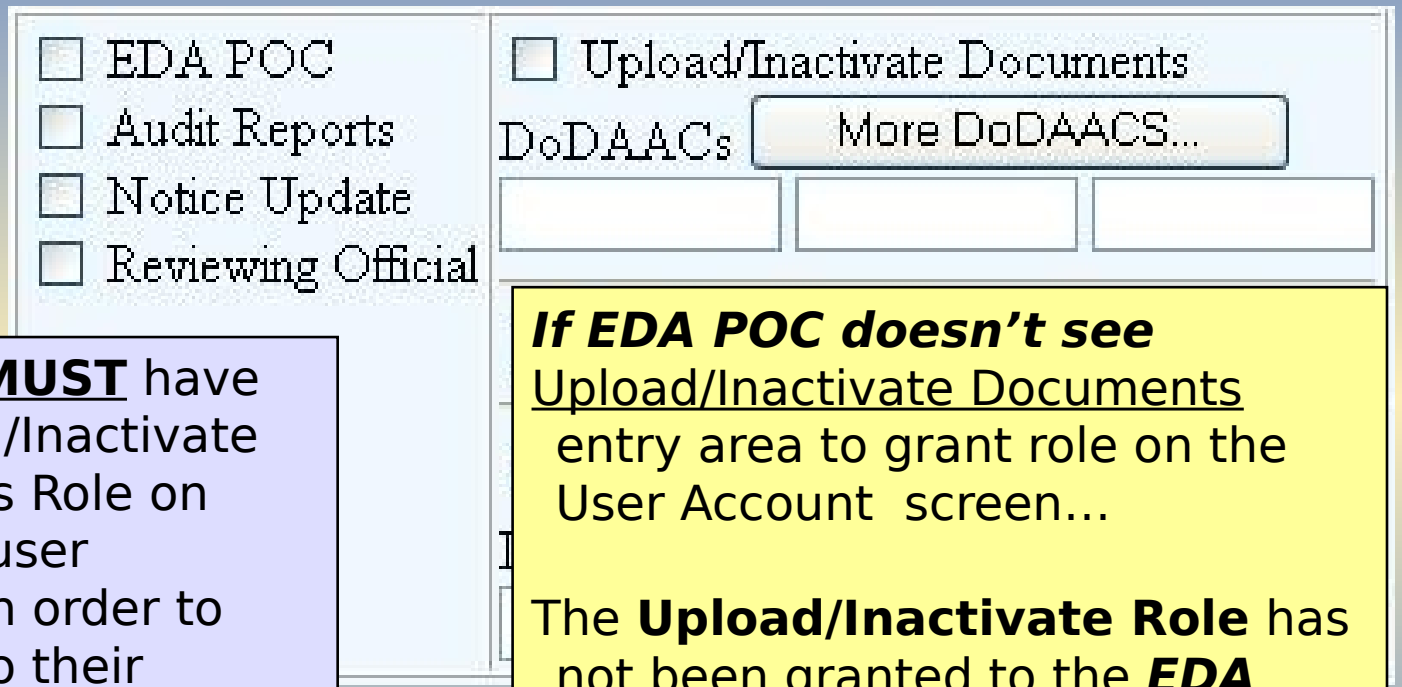
EDA POCs **MUST** have the Upload/Inactivate Documents Role on their *own* user accounts in order to *delegate* to their community.

EDA POCs obtain the role by requesting it

To activate special roles, Check the corresponding checkboxes.

Definition: *Need-to-Know* – The principle by which users are only granted access to the information, assets, and resources necessary to perform their assigned job functions.

EDA POC 'toggles' on Role



EDA POCs **MUST** have the Upload/Inactivate Documents Role on their *own* user accounts in order to *delegate* to their community.

EDA POCs obtain the role by requesting it from their C/S/A Executives.

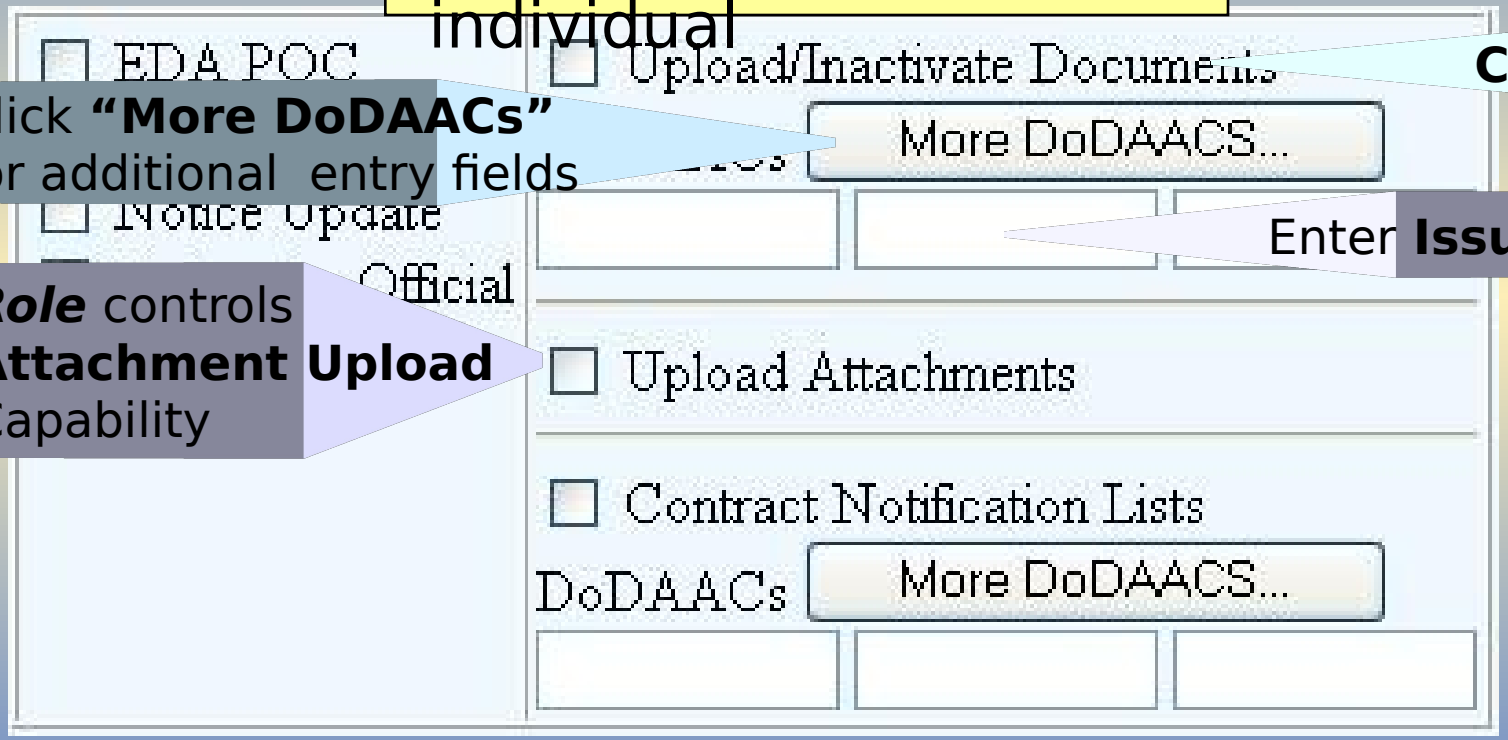
If EDA POC doesn't see Upload/Inactivate Documents entry area to grant role on the User Account screen…

The **Upload/Inactivate Role** has not been granted to the ***EDA POC*** user account

Contact the Executive for assistance in granting the role.

DoDAACs Required for Role

EDA POC may check roles required for individual



Click **"More DoDAACs"** for additional entry fields

Check "Role"

Enter **Issue DoDAAC(s**

Role controls **Attachment Upload** Capability

User's functionality is restricted to specific **Issue** DoDAACs.

After Role Granted

To Inactivate or Replace a Base Contract, a Contract Modification, a Contract Delivery Order or Task Order

- Log into EDA
  - (http://eda.ogden.disa.mil) or
  - (http://eda.cols.disa.mil)

Note – EDA Server's replicate data constantly, therefore, stay at one site during upload activity.

Inactivate a Document

To inactivate or replace a document, you must first search for the contract…

To inactivate/replace a Contract in EDA

CLICK
"Contracts"
on the Document Selection

Search for a Contract…

Use any Contract Search Option

Contract Search Options

Use any Contract query option to locate desired contract

Supply *criteria* for option selected

Click **"View"** for results of query

Search Options are categorized by

Specific Contract

Date Ranges &

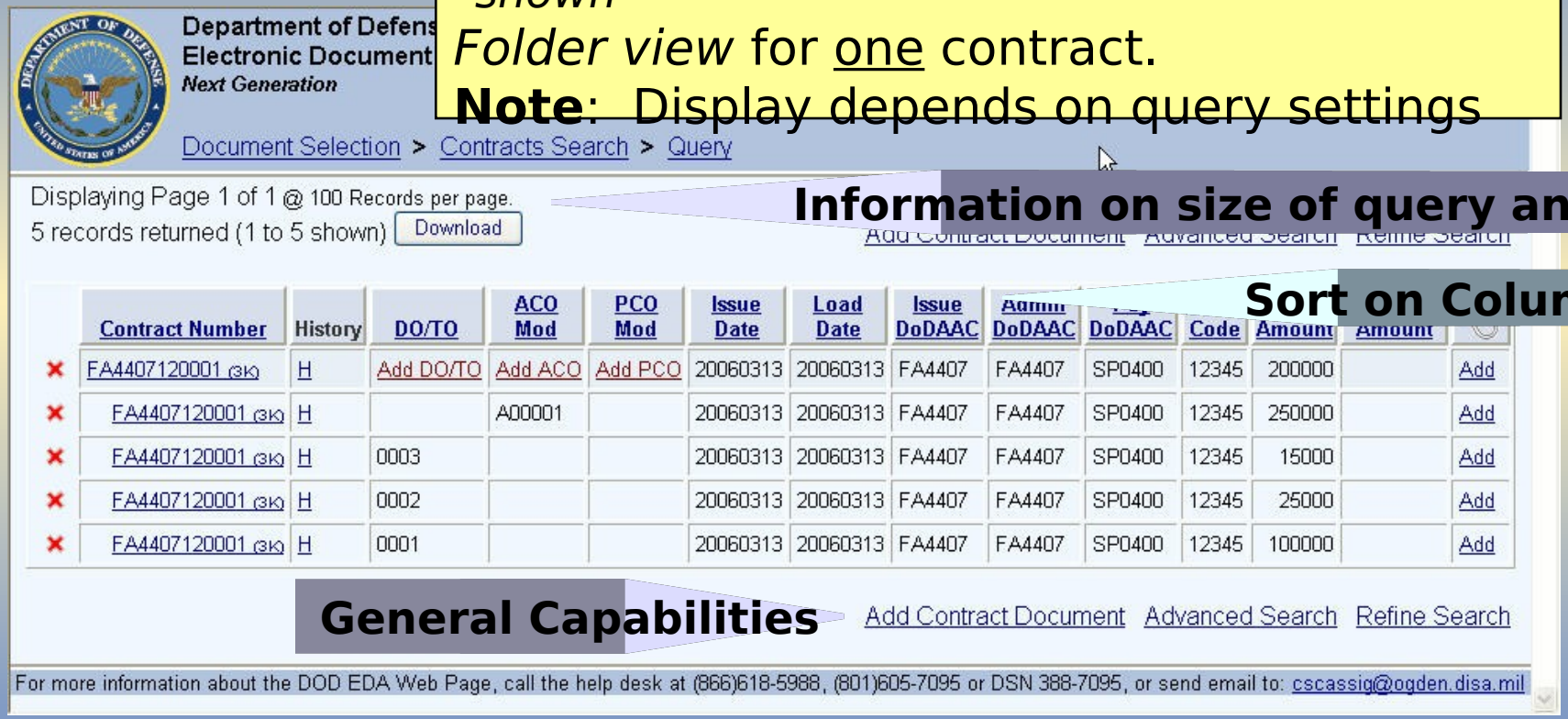
Custom – Advanced Search

Contract Query Result Set

Contact Query Result Page...*Sample shown*

Folder view for one contract.

Note: Display depends on query settings


Department of Defens
Electronic Document
Next Generation
Document Selection > Contracts Search > Query
Displaying Page 1 of 1 @ 100 Records per page.
5 records returned (1 to 5 shown)
Download
Add Contract Document
Advanced Search
Refine Search
Information on size of query and Pag
Sort on Column
Contract Number
History
DO/TO
ACO Mod
PCO Mod
Issue Date
Load Date
Issue DoDAAC
DoDAAC
DoDAAC
Code
Amount
Amount
FA4407120001 (3K) H Add DO/TO Add ACO Add PCO 20060313 20060313 FA4407 FA4407 SP0400 12345 200000 Add
FA4407120001 (3K) H A00001 20060313 20060313 FA4407 FA4407 SP0400 12345 250000 Add
FA4407120001 (3K) H 0003 20060313 20060313 FA4407 FA4407 SP0400 12345 15000 Add
FA4407120001 (3K) H 0002 20060313 20060313 FA4407 FA4407 SP0400 12345 25000 Add
FA4407120001 (3K) H 0001 20060313 20060313 FA4407 FA4407 SP0400 12345 100000 Add
General Capabilities
Add Contract Document
Advanced Search
Refine Search
For more information about the DOD EDA Web Page, call the help desk at (866)618-5988, (801)605-7095 or DSN 388-7095, or send email to: cscassig@ogden.disa.mil

Interface options and their behavior...

Interface Options on Result Page

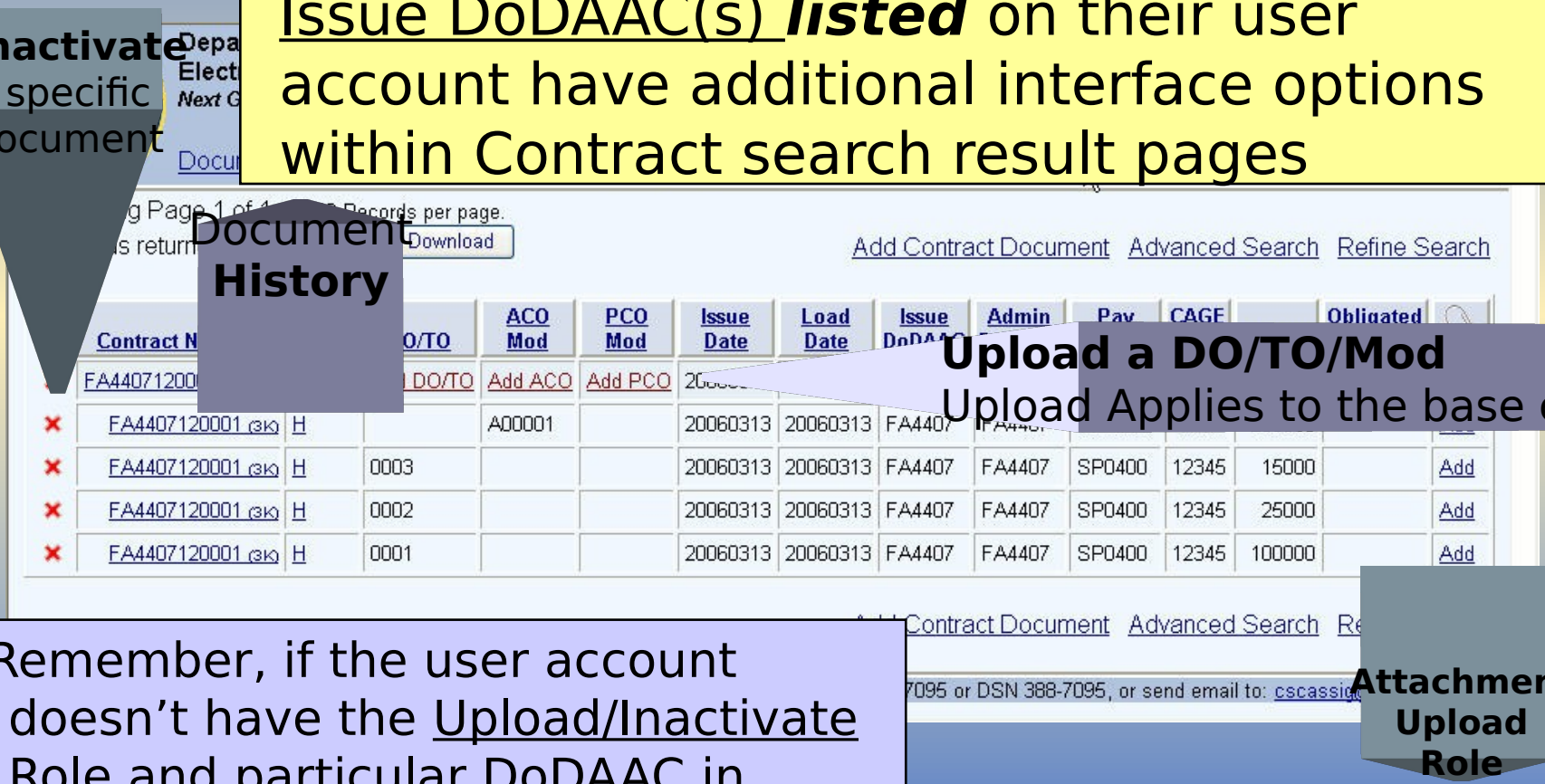
Users with the Upload/Inactivate Role & Issue DoDAAC(s) ***listed*** on their user account have additional interface options within Contract search result pages

Inactivate a specific document

Document History

Upload a DO/TO/Mod
Upload Applies to the base contra

Attachment Upload Role



Remember, if the user account doesn't have the Upload/Inactivate Role and particular DoDAAC in query result, the user will NOT see options for uploading and/or inactivating documents

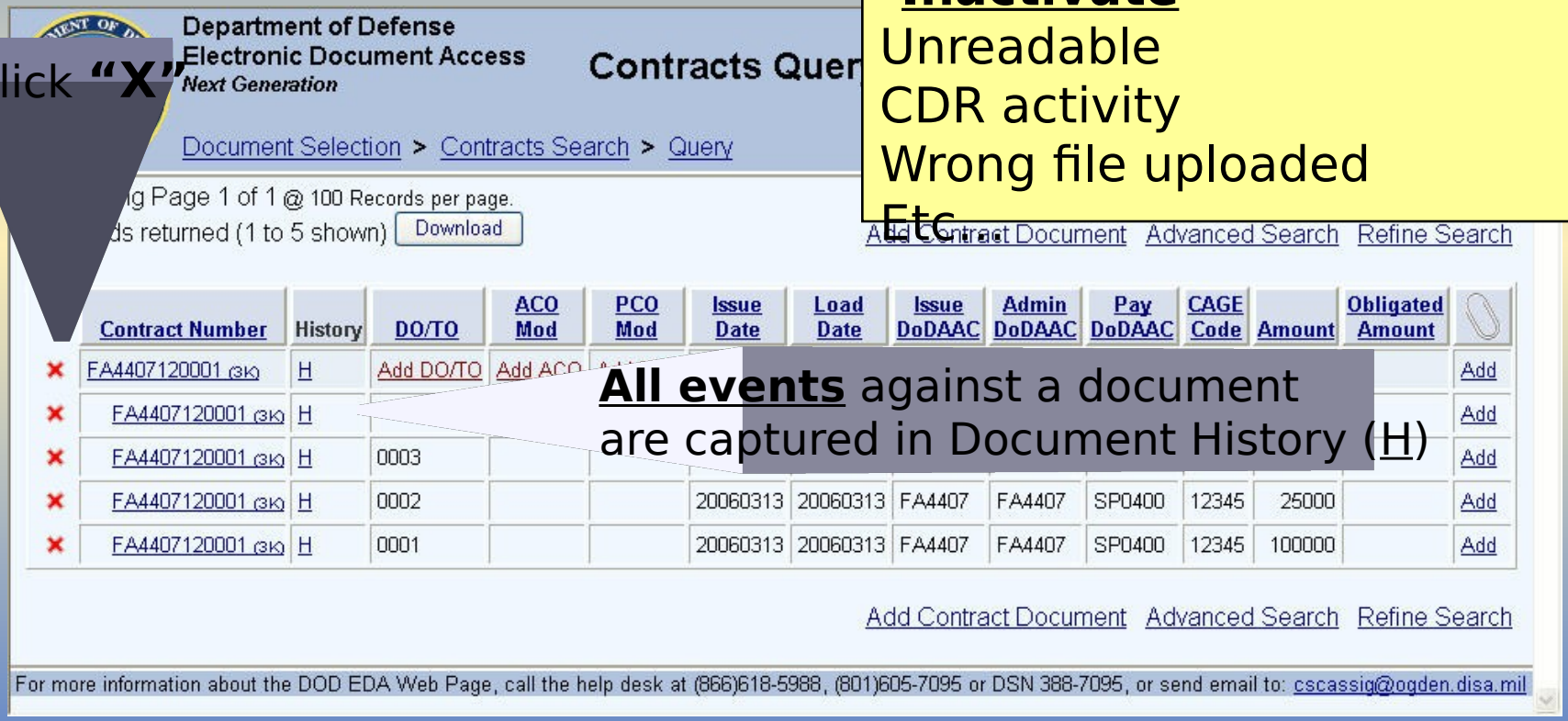
To Inactivate a Document…

Inactivate a Document

Possible Reasons to Inactivate

Unreadable
CDR activity
Wrong file uploaded
Etc.

Click **"X"**



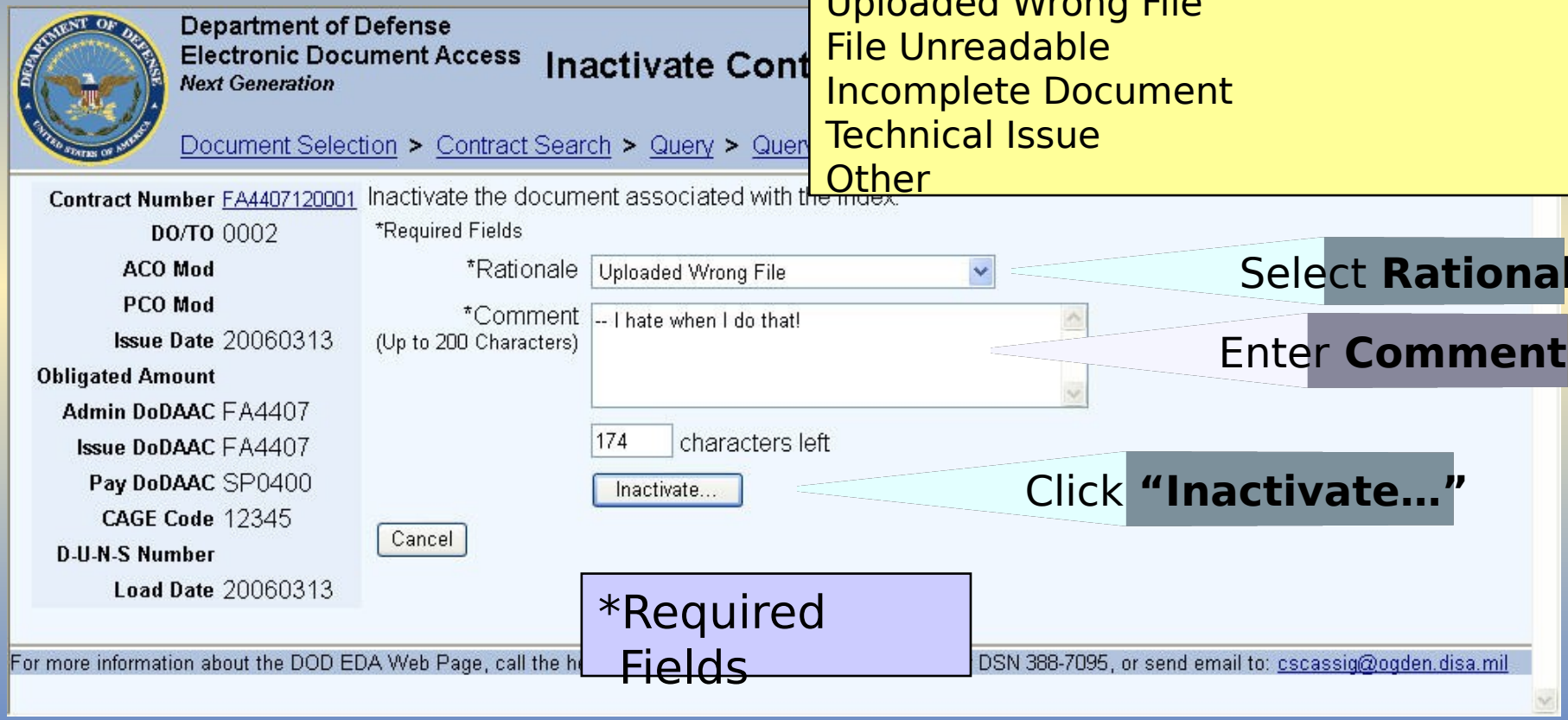
All events against a document are captured in Document History (H)

Inactivate a Document…

Rationale & Comment to Inactivate

Why are you Inactivating the Document?

Uploaded Wrong File
File Unreadable
Incomplete Document
Technical Issue
Other



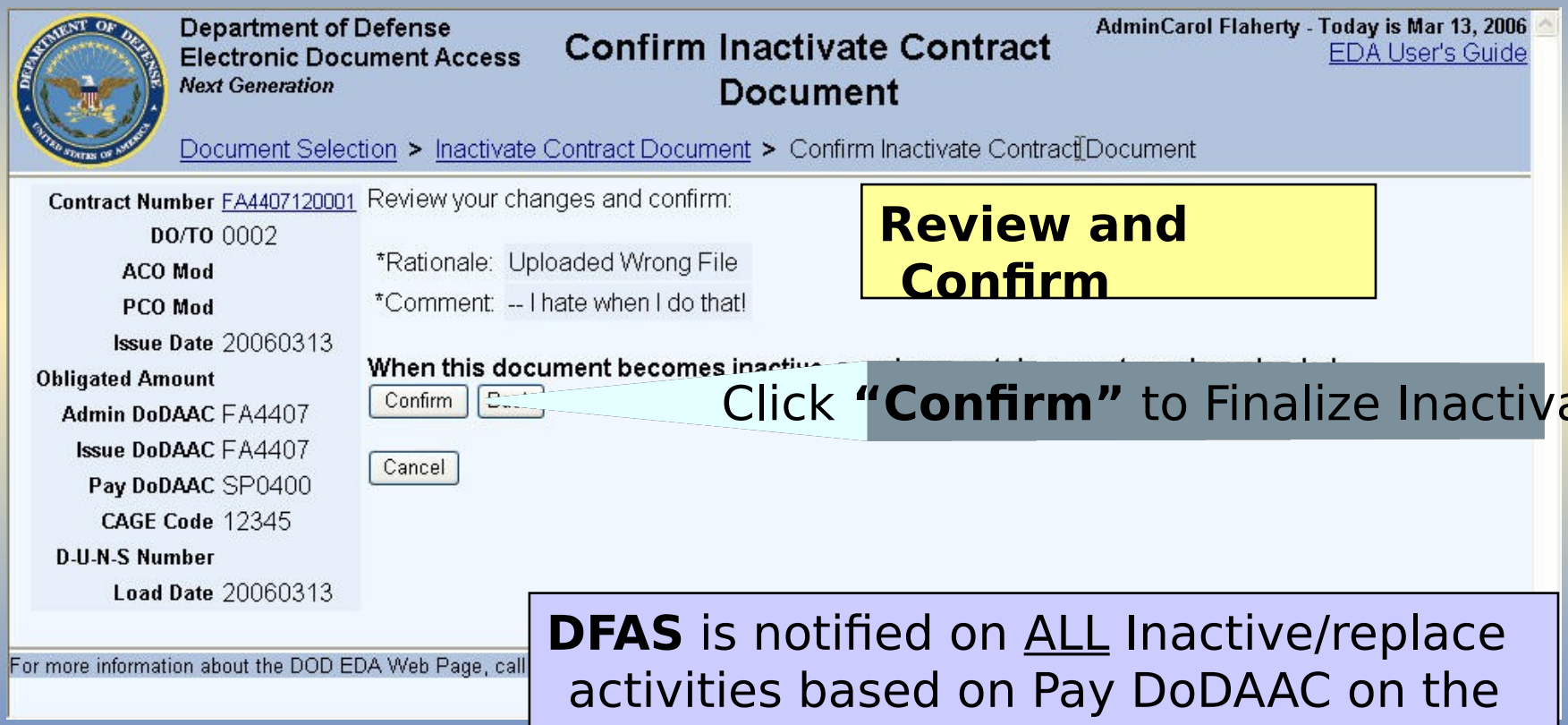
Select **Rationale**

Enter **Comment**

Click **“Inactivate…”**

*Required Fields

Confirm Inactivation



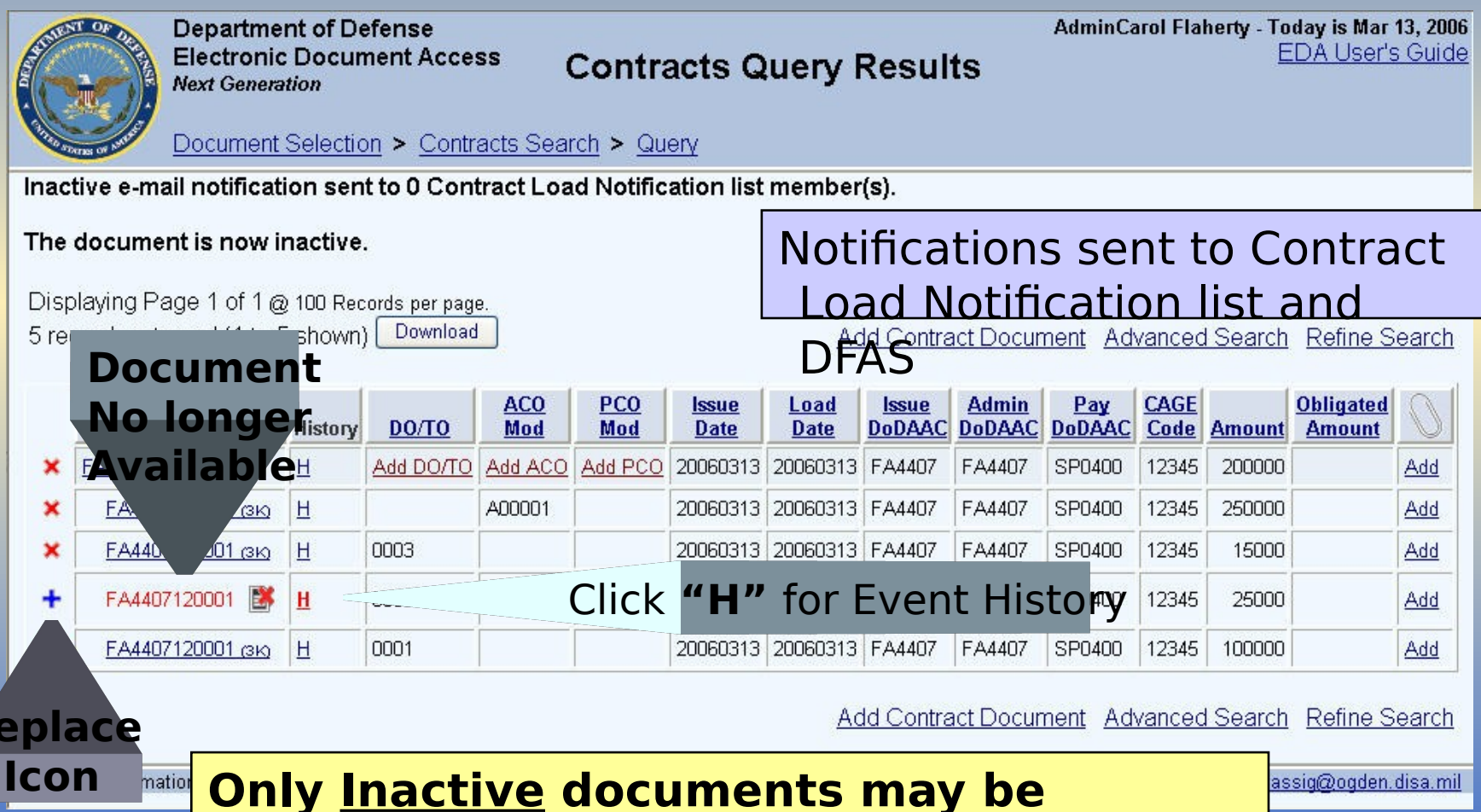
Review and Confirm

Click **"Confirm"** to Finalize Inactivat

DFAS is notified on ALL Inactive/replace activities based on Pay DoDAAC on the index

If Contract Load Notification list *exists* all participants are notified on inactive and/or replace activities.

After Inactivation…Result Page



Notifications sent to Contract Load Notification list and DFAS

Document No longer Available

Click **"H"** for Event History

Replace Icon

Only <u>Inactive</u> documents may be replaced

Inactivation Notification

You replied on 3/10/2006 12:07 PM.

From: steven.p.jones@eds.com Sent: Fri 3/10/2006 6:02 AM

To: Flaherty, Carol J

Cc:

Subject: EDA Contract document inactivated FA4407000001--CJF

This message was automatically generated. Please do not respond to this message.

An EDA user has inactivated the contract document for the following contract:

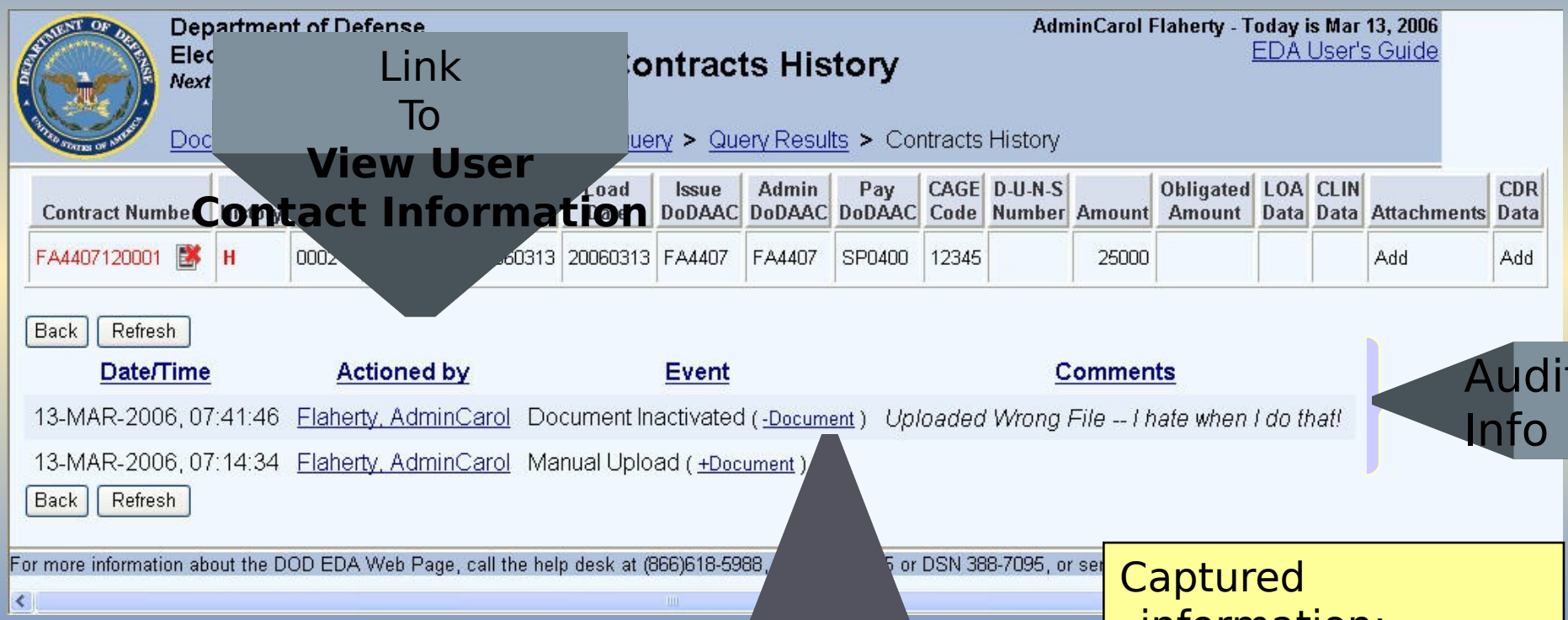
Contract: FA4407000001
DO/TO:
ACO Mod: CJF
PCO Mod:
Rationale: Uploaded Wrong File

Informational Inactivation Details

This contract is no longer available in EDA. Authorized EDA users may upload a replacement document. When this occurs, you will receive an e-mail notification.

If you have any questions regarding EDA, please contact the EDA Help Desk at: (866)618-5988, (801)605-7095 or DSN: 388-7095, or with email at: cscassig@ogden.disa.mil(Subject: EDA Assistance).

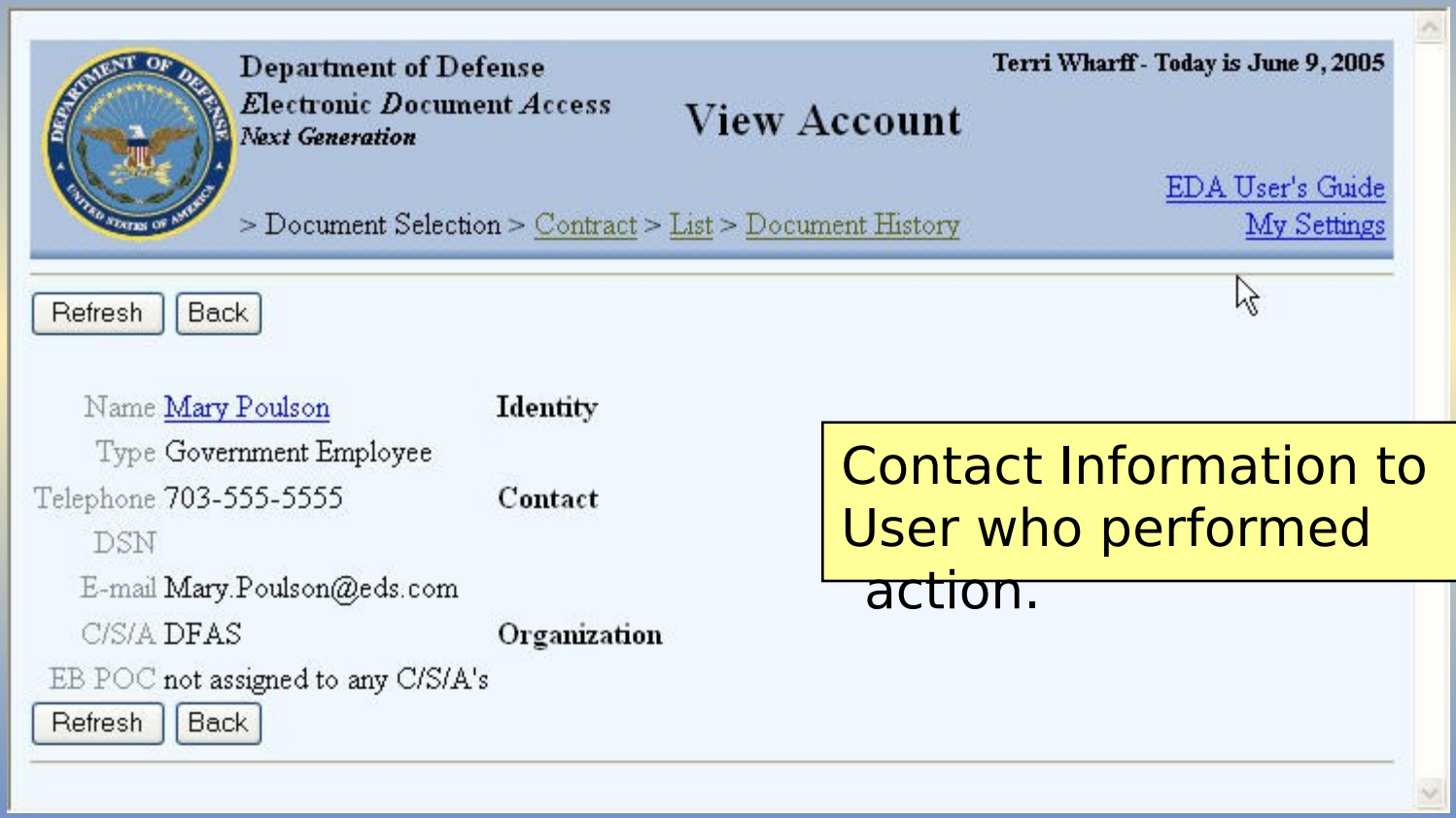
History of Events



Captured information:

Date
Time
Action by
Event
Notes/Comments

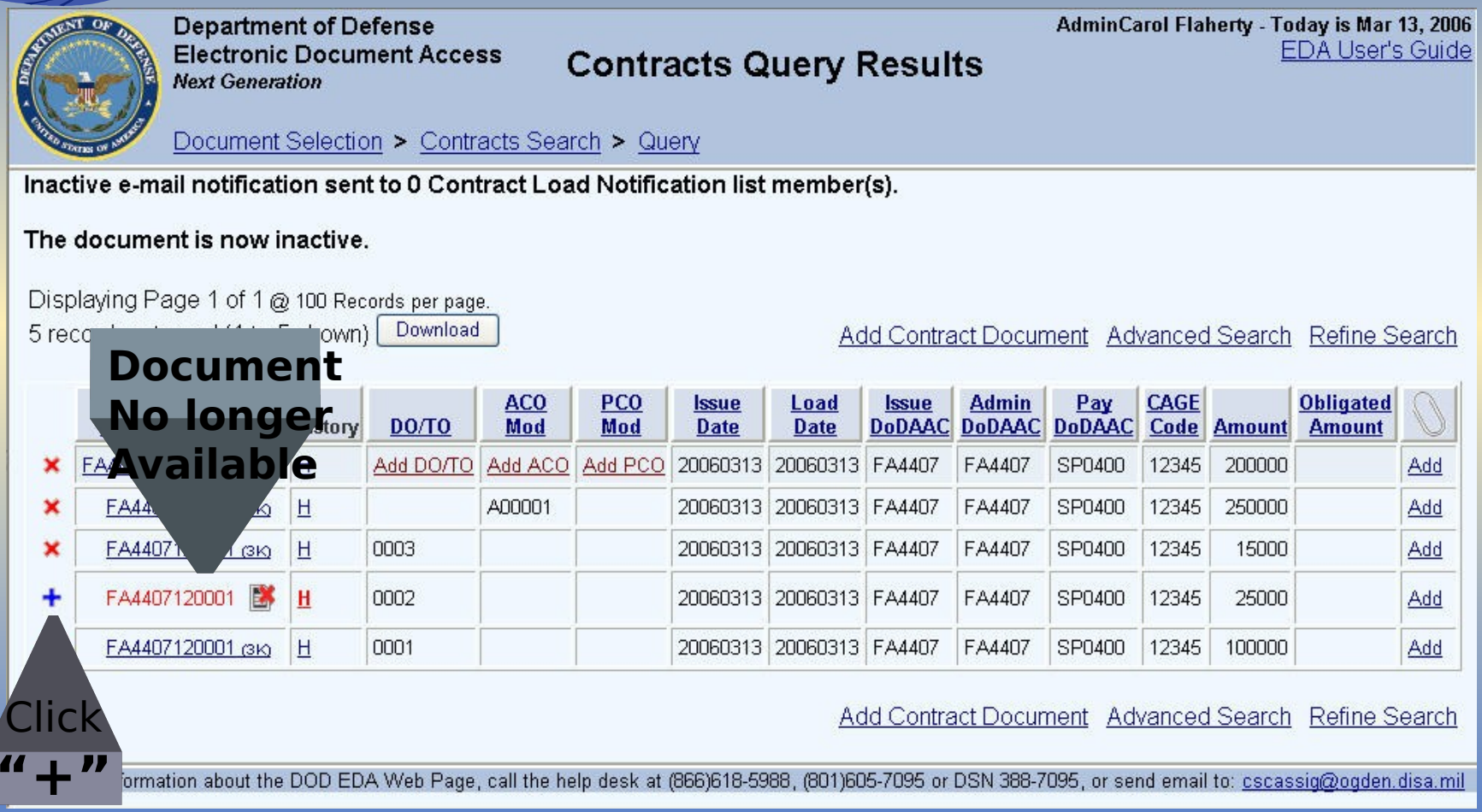
View Contact Information



Contact Information to User who performed action.

Let's Replace the document…

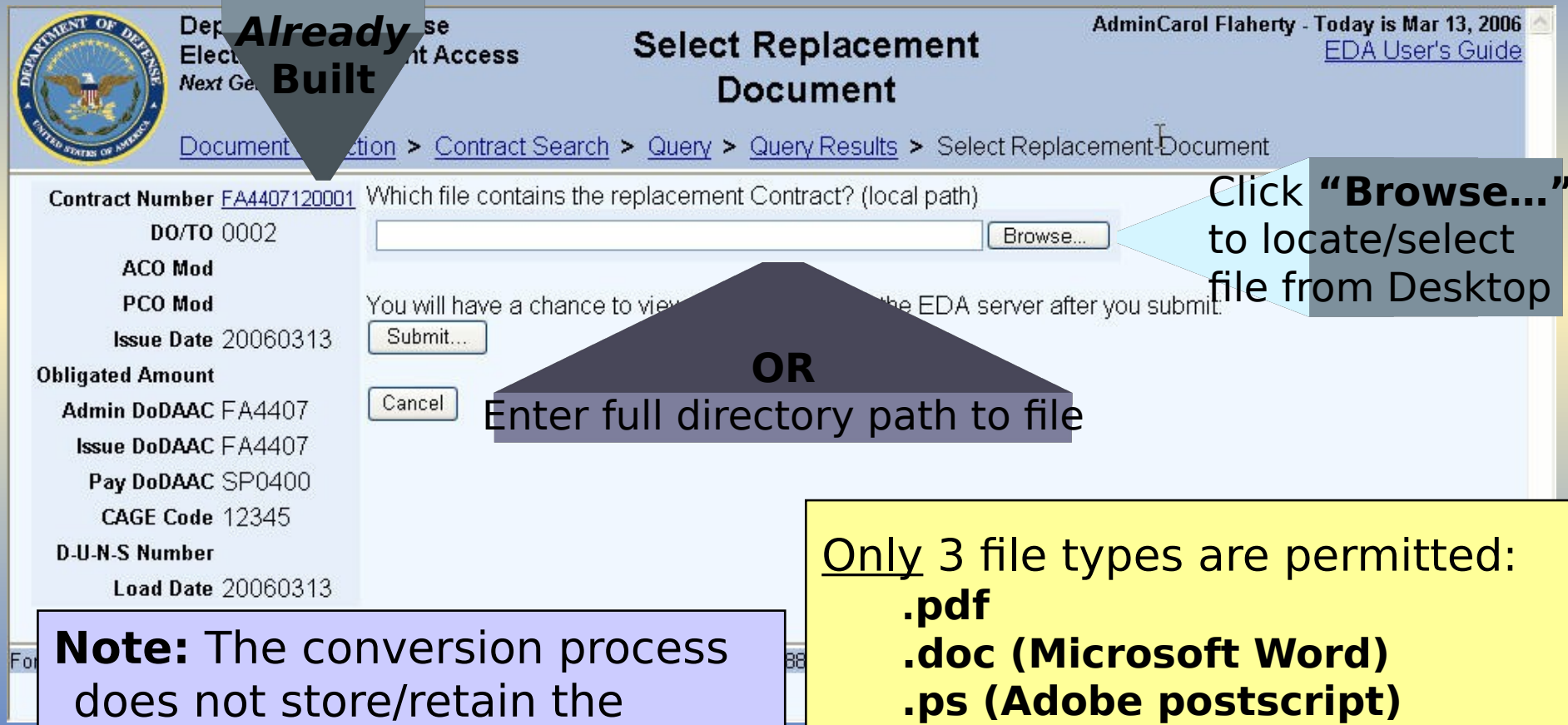
Replace Document



			DO/TO	ACO Mod	PCO Mod	Issue Date	Load Date	Issue DoDAAC	Admin DoDAAC	Pay DoDAAC	CAGE Code	Amount	Obligated Amount	
×	FA	story	Add DO/TO	Add ACO	Add PCO	20060313	20060313	FA4407	FA4407	SP0400	12345	200000		Add
×	FA44	H		A00001		20060313	20060313	FA4407	FA4407	SP0400	12345	250000		Add
×	FA44071 (3K)	H	0003			20060313	20060313	FA4407	FA4407	SP0400	12345	15000		Add
+	FA4407120001	H	0002			20060313	20060313	FA4407	FA4407	SP0400	12345	25000		Add
	FA4407120001 (3K)	H	0001			20060313	20060313	FA4407	FA4407	SP0400	12345	100000		Add

Replace Document

Index *Already* Built



Click **"Browse…"** to locate/select file from Desktop

OR

Enter full directory path to file

Note: The conversion process does not store/retain the original form of the document. Conversion is accomplished in "near real-time".

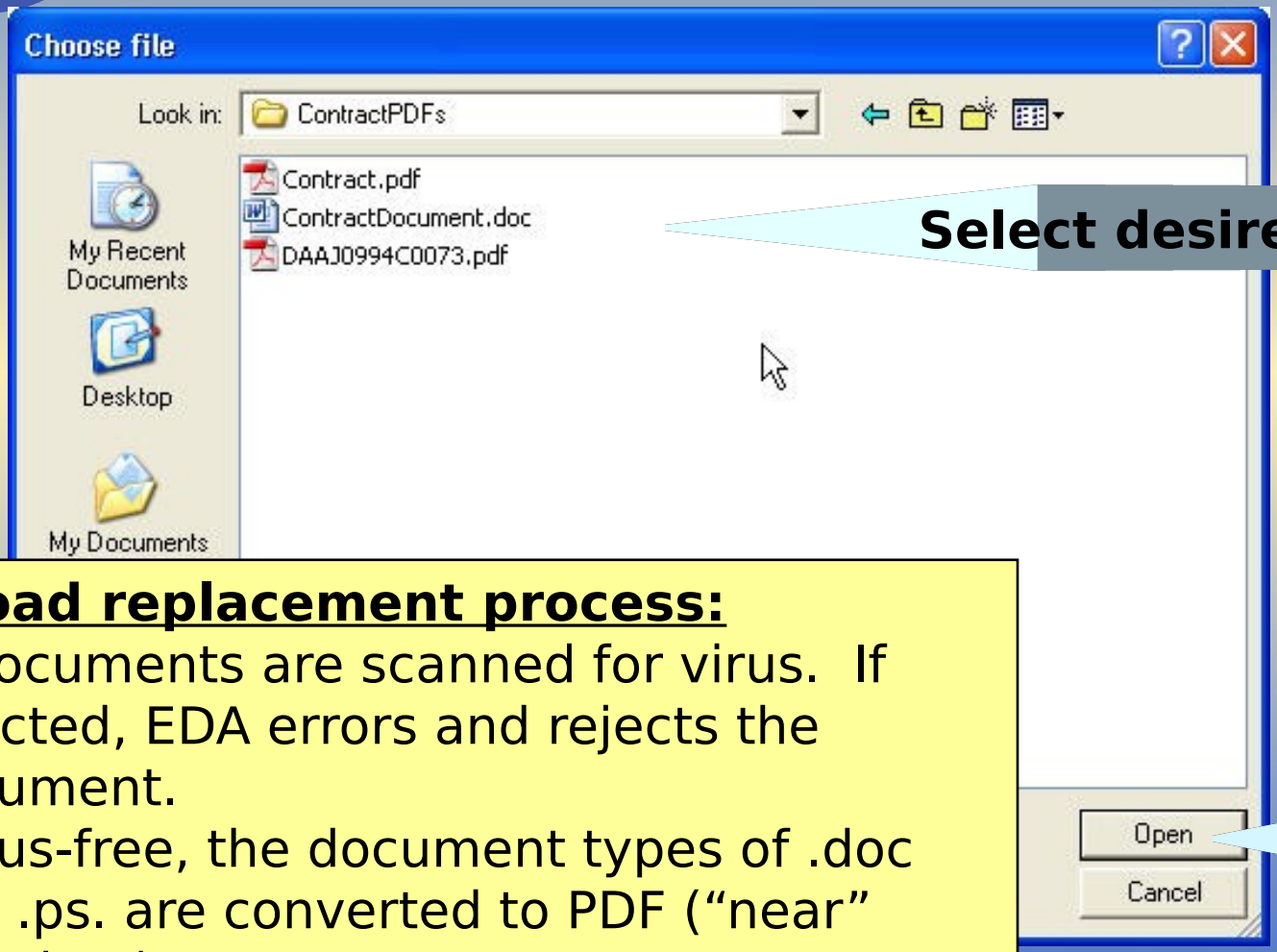
Only 3 file types are permitted:

- **.pdf**
- **.doc (Microsoft Word)**
- **.ps (Adobe postscript)**

EDA will convert .doc & .ps to .pdf

EDA presents an error message for invalid file types during upload

Browse/Select file to be uploaded



Select desired file

Click **"Open"**

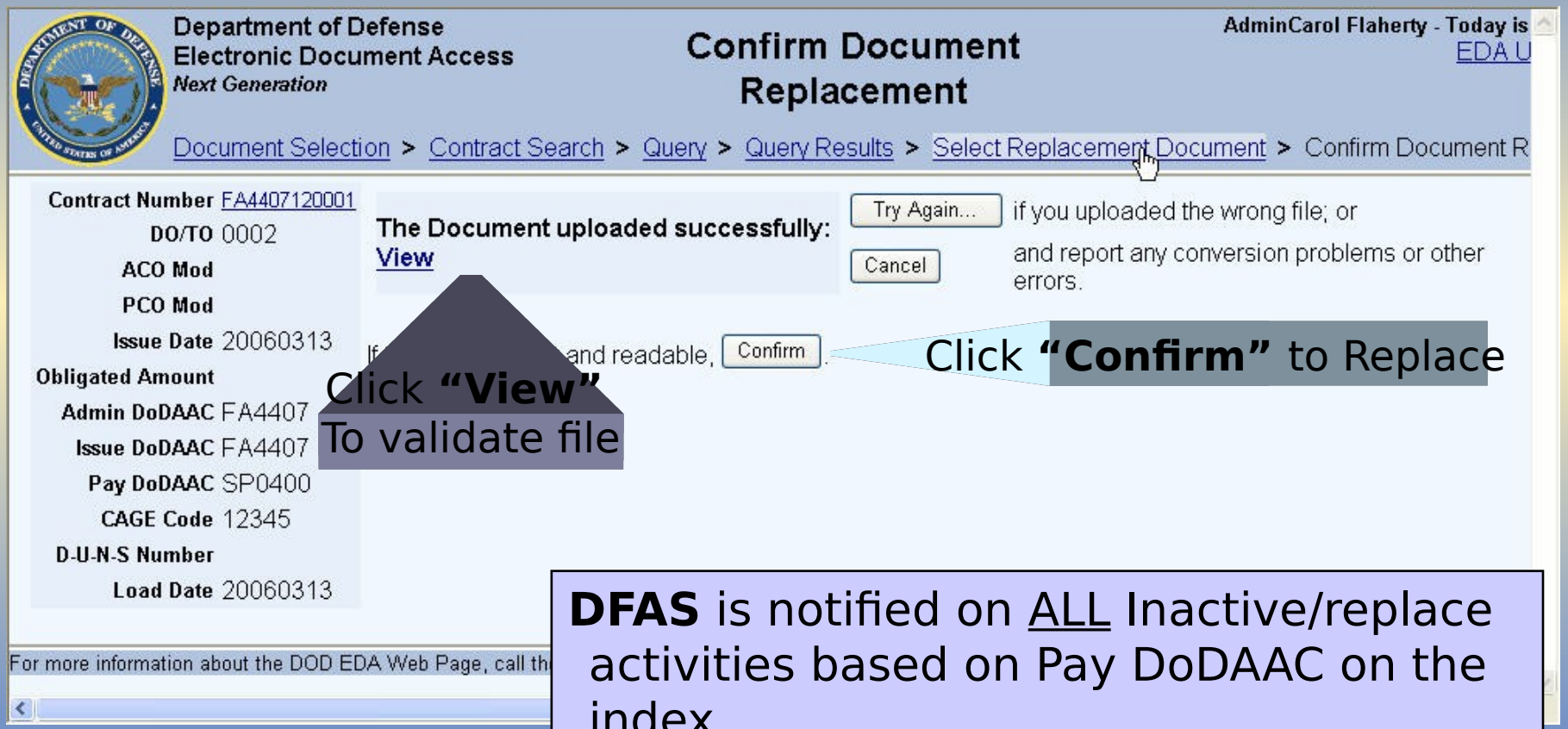
Upload replacement process:

All documents are scanned for virus. If infected, EDA errors and rejects the document.

If virus-free, the document types of .doc and .ps. are converted to PDF ("near" real-time).

After successful conversion, the .pdf is

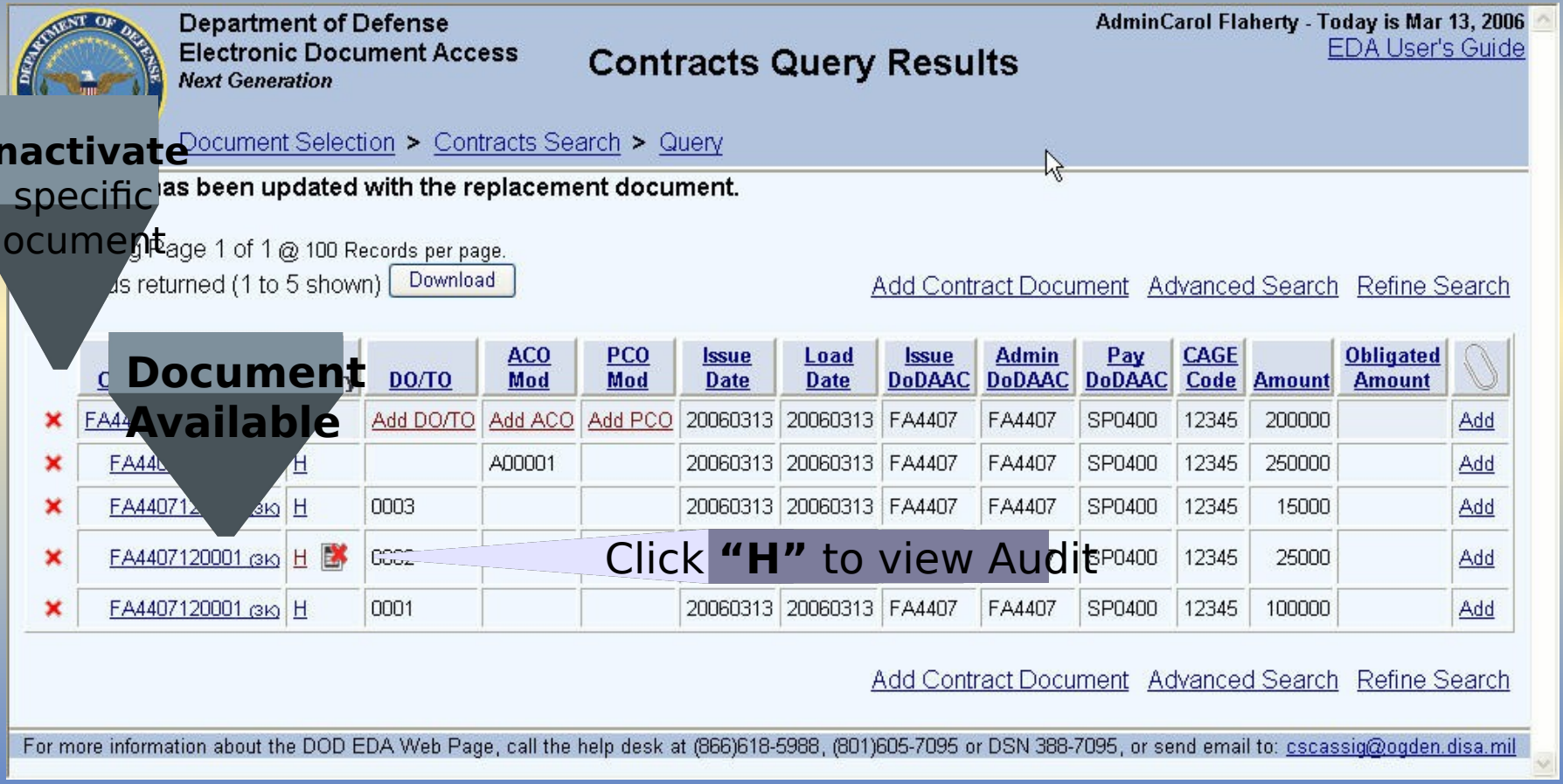
Confirm Replacement Document



DFAS is notified on ALL Inactive/replace activities based on Pay DoDAAC on the index

If Contract Load Notification list *exists* all participants are notified on inactive and/or replace activities.

After Replacement…Result Page



Inactivate a specific document

Document Available

Click **"H"** to view Audit

View History after Replace

Department of Defense
Electronic Document Access
Next Generation

Contracts History

AdminCarol Flaherty - Today is Mar 13, 2006
EDA User's Guide

Document Selection > Contract Search > Query > Query Results > Contracts History

Contract Number	History	DO/TO	ACO Mod	PCO Mod	Issue Date	Load Date	Issue DoDAAC	Admin DoDAAC	Pay DoDAAC	CAGE Code	D-U-N-S Number	Amount	Obligated Amount	LOA Data	CLIN Data	Attachments	CDR Data
FA4407120001 (3K)	H	0002			20060313	20060313	FA4407	FA4407	SP0400	12345		25000				Add	Add

Back Refresh

Date/Time	Actioned by	Event	Comments
13-MAR-2006, 07:48:42	Flaherty, AdminCarol	Document Replaced (+Document)	
13-MAR-2006, 07:41:46	Flaherty, AdminCarol	Document Inactivated (-Document)	*Uploaded Wrong File -- I hate when I do that!*
13-MAR-2006, 07:14:34	Flaherty, AdminCarol	Manual Upload (+Document)	

Back Refresh

For more information about the DOD EDA Web Page, call the help desk [illegible]88, (801)605-7095 or DSN 388-7095, or send email to: cscassig@ogden.disa.mil

Audit Info

Links To **"Previous"** Documents

An expanded "Event" History…

View History – repeating process

Department of Defense
Electronic Document Access
Next Generation
Contracts History
AdminCarol Flaherty - Today is Mar 13, 2006
EDA User's Guide
Document Selection > Contract Search > Query > Query Results > Contracts History
Contract Number | History | DO/TO | ACO Mod | PCO Mod | Issue Date | Load Date | Issue DoDAAC | Admin DoDAAC | Pay DoDAAC | CAGE Code | D-U-N-S Number | Amount | Obligated Amount | LOA Data | CLIN Data | Attachments | CDR Data
FA4407120001 (3K) | H | 0002 | | | 20060313 | 20060313 | FA4407 | FA4407 | SP0400 | 12345 | | 25000 | | | | Add | Add
Back
Refresh
Date/Time | Actioned by | Event | Comments
13-MAR-2006, 07:51:19 | Flaherty, AdminCarol | Document Replaced (+Document)
13-MAR-2006, 07:51:01 | Flaherty, AdminCarol | Document Inactivated (-Document) | Uploaded Wrong File -- I can't believe I did it AGAIN! I'll try again.
13-MAR-2006, 07:48:42 | Flaherty, AdminCarol | Document Replaced (+Document)
13-MAR-2006, 07:41:46 | Flaherty, AdminCarol | Document Inactivated (-Document) | Uploaded Wrong File -- I hate when I do that!
13-MAR-2006, 07:14:34 | Flaherty, AdminCarol | Manual Upload (+Document)
Back
Refresh
For more information about the DOD EDA Web Page, call the help desk at (866)
21)605-7095 or DSN 388-7095, or send email to: cscassig@ogden.disa.mil

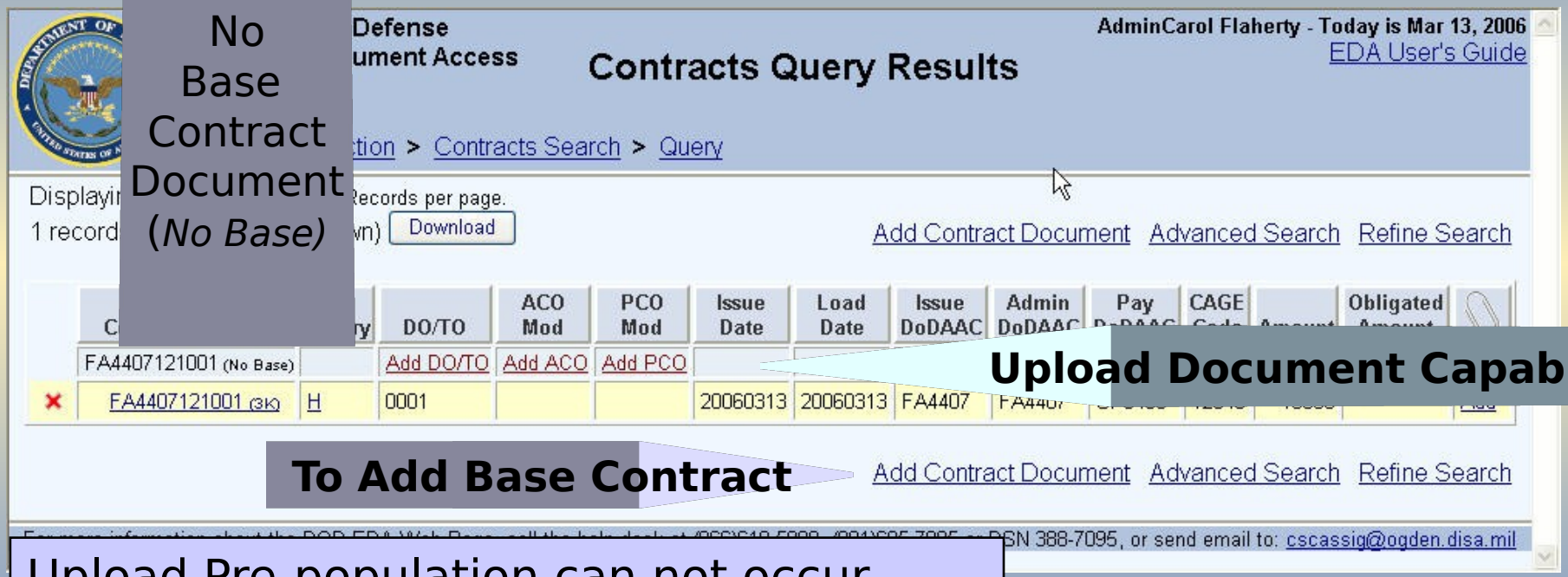
Audit Info

Links To **"Previous"** Documents

No Base Contract Document…

Base Contract not Required

No Base Contract Document (*No Base)*



Upload Pre-population can not occur when a Base Contract doesn't exist (No Base)

Sample Contract Load Notifcation

EDA User Contract Load Notification

From: steven.p.jones@eds.com Sent: Mon 3/13/2006 4:41 AM
To: Flaherty, Carol J
Cc:
Subject: EDA New Contract Document(s) Posted

The following contract document(s) posted on: 03/10/2006

Contract	Del Order	ACO Mod	PCO Mod	CAGE	D-U-N-S
FA4407000001	CAROL				
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new app.Get D					
&precord key='0EA5EF5BB4C03C2FE04408000955CA14'&pMultipart ID=					
FA4407000001		CJF		12345	
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new app.Get Doc?ptable id=2					
&precord key='0EA5F8E51CC03C27E04408000955CA14'&pMultipart ID=					
FA4407000001		OREO		12345	
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new app.Get Doc?ptable id=2					
&precord key='0EA5EF5BB4C43C2FE04408000955CA14'&pMultipart ID=					
FA4407000001			ROXY	12345	
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new app.Get Doc?ptable id=2					
&precord key='0EA5F8E51CC23C27E04408000955CA14'&pMultipart ID=					

This message was automatically generated o
carol.flaherty@eds.com

Links to new documents

EDA Users receive notification with embedded links to the newly uploaded or replaced documents

Sample Contract Load Notifcation

Non-EDA User Contract Load Notification

The following contract document(s) posted on: 03/10/2006

Contract	Del Order	ACO Mod	PCO Mod	CAGE	D-U-N-S
FA4407000001	CAROL				
FA4407000001		CJF		12345	
FA4407000001		OREO		12345	
FA4407000001			ROXY	12345	

This message was automatically generated on behalf of:
carol.flaherty@eds.com

PLEASE DO NOT RESPOND to this message.

Non-EDA Users receive an informational e-mail on Contract Load Notification.

EDA User's Guide

Refer to the EDA Users Guide

- STEP-by-STEP instructions (for all Capabilities)
- Training Modules
- Entire section dedicated to the EDA Executive and the EDA POC and their tasks/activities